

Claims

✓ What is claimed is:

- 5 1. A guidance process of maintaining goals in a system  
with at least first and second goal types so as to  
promote goal alignment, the guidance process comprising:  
providing a first rule for relationships  
between goals of the first goal type;  
10 providing a second rule for relationships  
between goals of the first goal type and goals of the  
second goal type; and  
determining content for a user interface, based  
on the first and second rules, such that the content  
15 facilitates goal alignment.
2. The method of Claim 1, further comprising:  
activating a wizard that facilitates goal  
modification, wherein:  
20 determining content for user interfaces  
comprises automatically customizing content for a screen  
capable of being displayed by the wizard, based on at  
least one of the first rule and the second rule.

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3. The method of Claim 2, further comprising:

activating the wizard in response to a request  
from a user to modify a goal;

prompting the user to select a team to be  
5 associated with the goal from a drop-down list of teams;  
and

prompting the user to select a parent goal for  
the goal from a list showing all team goals linked to the  
selected team.

10 4. The method of Claim 3, further comprising:

in response to modification of the goal,  
automatically determining whether a child goal exists for  
the goal; and

15 in response to determining that the child goal  
does exist, automatically flagging the child goal to  
cause a user interface for an owner of that child goal to  
indicate that the child goal should be checked for  
alignment.

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5. The method of Claim 4, further comprising:

determining that the owner has verified the  
alignment of the child goal; and

25 in response to determining that the owner has  
verified the alignment, automatically unflagging the  
child goal.

6. The method of Claim 5, wherein determining content  
for user interfaces comprises automatically flagging the  
30 goal for supervisory approval in response to determining  
that the user has a supervisor.

7. The method of Claim 6, wherein determining content for user interfaces comprises:

- populating objects for a graphical user
- 5 interface with alignment information and warnings; and
- providing connections to tools for checking alignment.

8. The method of Claim 7, wherein populating objects
- 10 for a graphical user interface with alignment information and warnings comprises specifying an appearance for at least one of a manager warning object, a feedback warning object, and an alignment warning object.

- 15 9. The method of Claim 8, wherein specifying an appearance for at least one of a manager warning object, a feedback warning object, and an alignment warning object comprises highlighting the alignment warning object in response to determining that the parent goal
- 20 has been modified.

10. The method of Claim 8, wherein specifying an appearance for at least one of a manager warning object, a feedback warning object, and an alignment warning
- 25 object comprises highlighting the manager warning object in response to determining that a supervisor has provided feedback pertaining to the goal.

11. The method of Claim 7, wherein:

providing connections to tools for checking alignment comprises providing an alignment warning object; and

5 the method further comprises displaying an interface for viewing the parent goal, in response to selection of the alignment warning object.

12. The method of Claim 7, wherein determining content  
10 for user interfaces further comprises providing an evaluation status object that indicates whether a supervisor has evaluated the goal.

13. The method of Claim 12, wherein determining content  
15 for user interfaces further comprises providing an evaluation summary object that reflects evaluation results relating to at least one of importance and effectiveness of the goal.

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14. A method for managing goals, the method comprising:

storing at least first and second goals:

storing a relationship between the first goal

and the second goal;

5 detecting modification of the first goal; and

in response to detecting modification of the

first goal, facilitating goal alignment by causing the second goal to be automatically highlighted for alignment verification.

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15. The method of Claim 14, wherein facilitating goal alignment comprises:

in response to detecting modification of the

first goal, automatically recognizing the second goal as

15 requiring alignment verification, based on the stored  
relationship; and

wherein causing the second goal to be

automatically highlighted is performed in response to recognizing the second goal as requiring alignment

20 verification.

16. / A method for automatically providing notification of changes to goals in a goal management system, the method comprising:

- storing an owner for a first goal in a data
- 5 processing system;
- storing a parent link relating the first goal to a parent goal in the data processing system;
- detecting modification of the parent goal;
- in response to detecting modification of the
- 10 parent goal, automatically recognizing the first goal as requiring alignment verification, based on the parent link; and
- in response to recognizing the first goal as requiring alignment verification, causing the first goal
- 15 to be highlighted for alignment verification in a display associated with the owner of the first goal.

17. The method of Claim 16, wherein the first goal is highlighted in further response to receiving a request

20 from the owner of the first goal to display one or more goals.

18. The method of Claim 16, further comprising permitting each goal to be linked to no more than one

25 parent goal.

19. A method for automatically soliciting feedback for changes to goals in a goal management system, the method comprising:

storing a reporting link that relates a  
5 reporting individual and a supervisor to whom the reporting individual reports directly;

storing a team owned by the reporting individual;

detecting storage of a goal relating to the  
10 team by the reporting individual; and

causing the goal to be automatically highlighted for approval in a display associated with the supervisor, based on the reporting link relating the reporting individual and the supervisor.

15 20. The method of Claim 19, wherein the goal is automatically highlighted for approval in response to creation of the goal.

20 21. The method of Claim 19, wherein the goal is automatically highlighted for approval in response to modification of the goal.

22. The method of Claim 19, wherein the goal is  
25 automatically highlighted for approval in response to creation of the reporting link.

23. The method of Claim 19, wherein the goal is  
30 automatically highlighted for approval in response to a request from the supervisor to display one or more goals.

24. The method of Claim 19, wherein each reporting individual is linked to no more than one supervisor.

25. The method of Claim 19, wherein one owner is named  
5 for each team.

26. The method of Claim 19, wherein:  
the goal is a team goal; and  
only the owner is permitted to manage the team  
10 goal.

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27. ✓ A method for keeping relationships between goals in a goal management system consistent with relationships between teams, the method comprising:

- 5           linking a first goal with a first team; and  
          allowing a child goal of the first goal to be linked with a second team only if the second team is a child team of the first team.

28. The method of Claim 27, wherein each team has no  
10 more than one parent team.

29. The method of Claim 27, further comprising importing at least a third team into the goal management system from a personnel database.

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30. A method for restricting links between goals based on team membership, the method comprising:

storing a team having a team owner and one or more team members;

5 storing a team goal having a link to the team; and

allowing a team-related goal that is linked to the team goal to be stored only if the team related goal has a goal owner who is one of the one or more team members.

31. The method of Claim 30, further comprising storing a personal goal that is not linked to any team goals or team-related goals.

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32. A method for managing goals according to Claim 30,  
the method further comprising:

storing an owner for a first goal;

storing a parent link relating the first goal

5 to a parent goal;

detecting modification of the parent goal;

in response to detecting modification of the  
parent goal, automatically recognizing the first goal as  
requiring alignment verification, based on the parent  
10 link; and

in response to recognizing the first goal as  
requiring alignment verification, causing the first goal  
to be highlighted for alignment verification in a display  
associated with the owner of the first goal.

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33. A method for managing goals according to Claim 32,  
the method further comprising:

storing a reporting link that relates a  
reporting individual and a supervisor to whom the

20 reporting individual reports directly;

storing a team owned by the reporting  
individual;

detecting storage of third goal relating to the  
team by the reporting individual; and

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causing the goal to be automatically  
highlighted for approval in a display associated with the  
supervisor, based on the reporting link relating the  
reporting individual and the supervisor.



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36. / Software for managing goals, the software  
comprising:

means for recording and modifying goals;

means for recording and modifying relationships

5 between the goals; and

means for automatically highlighting at least  
one of the goals in response to modification of a related  
goal to facilitating verification and modification of  
goal alignment.

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computer instructions that:

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5         store a parent link relating the first goal to
a parent goal;
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in response to modification of the parent goal,

10 automatically highlighted for alignment verification in a  
display associated with the owner of the first goal; and

15 38. The program product of Claim 37, wherein the computer instructions cause the first goal to be automatically highlighted for alignment verification in further response to a request from the owner of the first goal to display one or more goals.

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40. A program product for managing goals within an organization, the program product comprising:

computer instructions that:

store a reporting link that relates a reporting

5 individual and a supervisor to whom the reporting individual reports directly;

store a team owned by the reporting individual;

detect storage of a goal for the team by the reporting individual; and

10 cause the goal to be automatically highlighted for approval in a display associated with the supervisor, based on the reporting link relating the reporting individual and the supervisor; and

a computer-usable medium encoding the computer  
15 instructions.

41. The program product of Claim 40, wherein the computer instructions cause the goal to be automatically highlighted in response to detecting creation of the  
20 goal.

42. The program product of Claim 40, wherein the computer instructions cause the goal to be automatically highlighted in response to detecting modification of the  
25 team goal.

43. The program product of Claim 40, wherein the computer instructions cause the goal to be automatically highlighted in response to detecting linkage of the  
30 reporting individual and the supervisor.





48. ✓ A program product for managing goals within an organization, the program product comprising:

computer instructions that:

link a first goal with a first team; and

5                   allow a child goal of the first goal to be  
linked to a second team only if the second team is a  
child team of the first team; and

a computer-usable medium encoding the computer instructions.

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49. The program product of Claim 48, wherein the computer instructions permit each team to have no more than one parent team.

50. A program product for managing team goals and team-related goals within an organization, the program product comprising:

computer instructions that:

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5      store a team having a team owner and one or
      more team members;
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store a team goal having a link to the team;

and

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        allow a team-related goal that is linked to the
10  team goal to be stored only if the team-related goal has
    a goal owner who is one of the one or more team members;
    and

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a computer-usable medium encoding the computer instructions.

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51. The program product of Claim 50, wherein the computer instructions also store a personal goal that is not linked to any team goals or team-related goals.

52. /A system for managing goals, the system comprising:

processing resources that:

store an owner for a first goal;

store a parent link relating the first goal to

5 a parent goal;

detect modification of the parent goal;

in response to detecting modification of the  
parent goal, automatically recognize the first goal as  
requiring alignment verification, based on the parent

10 link; and

in response to recognizing the first goal as  
requiring alignment verification, cause the first goal to  
be highlight for alignment verification in a display  
associated with the owner of the first goal.

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53. /A system for managing goals, the system comprising:

processing resources that:

store a reporting link that relates a reporting  
individual and a supervisor to whom the reporting

20 individual reports directly;

store a team owned by the reporting individual;

detect storage of a goal relating to the team  
by the reporting individual; and

cause the goal to be automatically highlighted  
25 for approval in a display associated with the supervisor,  
based on the reporting link relating the reporting  
individual and the supervisor.

54. A system for managing goals, the system comprising:

processing resources that:

link a first goal with a first team; and

link a child goal of the first goal with a

5 second team only if the second team is a child team of  
the first team.

55. A system for managing goals, the system comprising:

processing resources that:

10 store a team having a team owner and one or

more team members;

store a team goal having a link to the team;

and

allow a team-related goal that is linked to the

15 team goal to be stored only if the team-related goal has  
a goal owner who is one of the one or more team members.

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